

2013 Professional Skills Program Course Catalog



7500 Greenway Center Drive
Suite 200
Greenbelt, MD 20770
301.277.0255
info@ColleagueConsulting.com

Quick Guide to the Nationwide Professional Skills Training Contract (DE-HC0000011)

What is it?

A competitively awarded small business set aside contract capable of meeting all of your training and workforce development needs. Using this vehicle means you don't have to obtain bids! The contract covers customized and off-the-shelf training on technical, supervisory/management and leadership topics, including courses required for professional certifications.

Who can use it?

All DOE programs, field sites, and national laboratories.

How do I order courses or services?

Courses can be ordered through DOE HQ by contacting Cheri Dent in the Office of Learning and Workforce Development. For additional information on pricing and schedule please go to: https://powerpedia.energy.gov/wiki/Professional_Skills_and_Technical_Training

A field site or headquarters organization may wish to order a course for up to 30 participants directly from Colleague Consulting by submitting a requisition for supplies and services. You should contact Colleague Consulting for pricing information and to identify course dates before submitting procurement information.

What else should I know?

- Courses can be delivered at your site
- Course formats include instructor-led, online learning, and blended learning
- Courses can be modified to meet your Office's specific training need
- Contract includes time-and-materials hourly pricing for related services such as:
 - Organizational and individual skills assessments and performance improvement
 - Executive coaching
 - Training needs assessments and evaluation
 - Performance improvement services
 - Change/transition training and implementation support

CONTACTS

Cheri Dent, DOE Program Manager
Cheri.dent@hq.doe.gov
(202) 586 - 9556

Robin Rodensky, Colleague Program Manager
rrodensky@colleagueconsulting.com
(301) 277- 0255 x103

Carol Vaughan, Deputy Program Manager
cvaughan@colleagueconsulting.com
(301) 277- 0255 x115

Zuleika Lim, Scheduling & Logistics
zlim@colleagueconsulting.com
(301) 277 - 0255 x116



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Supervision and Leadership Development Topics

SUPERVISORY ESSENTIALS: STRATEGIES FOR SUCCESS

This course is designed to assist new first-line supervisors in developing the competencies they need to achieve their primary responsibilities, which include accomplishing the goals of their units through the work of their employees and ensuring that the work of their employees is of the highest possible quality. The course can also serve as a refresher for experienced supervisors and managers. This course addresses competencies in the following Executive Core Qualifications: Leading People, Leading Change, Building Coalitions, and Communication.

The goal of this course is to help participants acquire skills that enable them to develop strategies for addressing the challenges of making the transition from employee to supervisor or manager. Participants examine leadership practices and situational leadership theory; practice the stages of team development; and identify ways for building trust and cooperation on teams. In addition, approaches to resolving conflict and techniques for collaboration and reaching consensus are discussed. Participants create a personal action plan to help guide them apply the skills learned from the course to their jobs.

Target Participants: This course is mandatory for newly appointed DOE first-level supervisors required to take 40 hours of supervisory training during the probation period. Experienced supervisors and managers are encouraged to attend this course as a refresher.

Course Length: 4 days

INTRODUCTION TO NAVIGATING THE FEDERAL HIRING PROCESS

The purpose of this course is to provide new supervisors with an overview of the Federal hiring process, and an understanding of the goals of the streamlined Federal hiring initiative. In particular, the focus of the course is on the role and responsibilities supervisors have in the hiring process and how to most effectively partner with human resources specialists to hire the best candidates. In this introductory course, participants learn about the types of information that they need to provide to their human resources partners and the options that are available to them in the hiring process. Participants are introduced to the specific laws, regulations, and Department policies that apply to Federal hiring processes, and learn the steps in conducting a job analysis which serves as a fundamental source of information required throughout the hiring process. Participants also learn how to develop experiential and situational interview questions, and tips for conducting an effective selection interview. Participants create a personal action plan to help guide them apply the skills learned from the course to their jobs.

Target Participants: This course is mandatory for newly appointed DOE first-level supervisors required to take 40 hours of supervisory training during the probation period. Experienced supervisors and managers are encouraged to attend this course as a refresher.

Course Length: 1 day

STRATEGIES AND TIPS FOR RECRUITING TOP TALENT

The purpose of this course is to provide supervisors and managers with a more in depth understanding of the Federal hiring process. This course is designed for supervisors and managers who are familiar with the Federal hiring process. It provides strategies and tips to help supervisors and managers work with human resources specialists to meet the Department's goal of reducing time-to-hire to an 80-day average. Participants learn best practice strategies for filling vacancies, including an understanding of the process of competitive examining, merit promotion, and excepted appointments. Participants also learn tips for preparing effective vacancy announcements and practice how to conduct effective interviews and reference checks. The course also covers effective management of the probation period. Participants create a personal action plan to help guide them apply the skills learned from the course to their jobs.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement. The course is especially appropriate for experienced supervisors or managers who wish for a more comprehensive understanding of the Federal hiring process; new human resources specialists; and human resource specialists who desire a refresher on the streamlined hiring process.

Course Length: 1 day

IS SUPERVISION FOR YOU? – A SUPERVISOR'S JOB PREVIEW

This one-day course is designed to introduce participants to the roles and responsibilities associated with being a supervisor to help them determine if supervision is an appropriate career path. During the course of the day, participants examine what makes a good supervisor, some common myths about the position, leadership vs. supervision, key challenges to being an effective supervisor, and a description of the explicit roles and responsibilities. Discussions as well as group and individual exercises throughout the day reinforce learning and culminate with a personal action plan to aid in the decision to pursue a supervisory role.

Target Participants: Professionals interested in pursuing a supervisory position.

Course Length: 1 day

INTRODUCTION TO HUMAN RESOURCES FOR MANAGERS, SUPERVISORS & TEAM LEADERS

This course is designed to provide managers, supervisors, and team leaders with a working knowledge of human resources (HR) management. The course focuses on the management functions of planning, organizing, directing, and controlling the day-to-day operations for managing the work of DOE Federal employees. Course content includes supervisory/managerial responsibilities in position management and classification, staffing, employee development, employee relations, equal employment opportunity and diversity, and labor management relations. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to attend this course to meet the 8-hour annual refresher training requirement. Also appropriate for professionals interested in human resource management.

Course Length: 3 days

MANAGING UP, DOWN AND ACROSS TO GET RESULTS

The bottom line for all organizations is to get results, achieve the mission, and work effectively toward the vision set by top management. This course shows those in the middle of the management ladder how to develop the skills to achieve all of these goals. The course helps participants think and work differently to become a more effective manager, influencer, relationship-builder, persuader, delegator, and advisor who can be trusted to move people and the agenda along. This course's highly participatory class on managing from the middle lays the groundwork for being more effective and workshops the skills required to get better results from teams, bosses, and subordinates. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers are encouraged to take this course to meet the 8-hour annual refresher training requirement.

Course Length: 1-2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

DELEGATION: DEVELOPING OTHERS THROUGH SHARED WORK

Effective delegation is one of the most powerful tools for leading and directing the work of others. When used appropriately, delegation allows managers to strategically allocate workload while providing challenging developmental assignments for their staff. This workshop shows participants how to design delegation plans for their team. It covers some of the common myths and misconceptions about delegating work to others and shows how good delegation is customized to the needs and abilities of individual employees. Managers who effectively delegate not only distribute work more effectively, but also grow the self-confidence and sense of achievement in their staff. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement. Also appropriate for those who directly or indirectly manage others, especially those who provide direction and leadership to staff without direct reporting authority, such as team leaders or matrix managers

Course Length: 1 day

BUILDING AND MANAGING EFFECTIVE TEAMS

In today's collaborative business environment effective teams are essential to organizational success. Through a combination of games, role-plays, discussion, and case-studies participants will examine the characteristics of high-performing teams and the stages of team development. Participants learn how to staff teams, assign tasks, and diagnose and practice communication techniques to handle a variety of team problems. Strategies for enhancing team member cooperation, as well as critical analysis necessary for problem solving and decision-making are introduced.

Upon completion of this workshop, participants are able to identify the characteristics of high performing teams, recognize the four developmental stages of teams, and identify appropriate strategies for leaders at each stage. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

Course Length: 1-2 days

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EVERYONE IS A LEADER: HOW TO DEMONSTRATE LEADERSHIP ATTRIBUTES FROM WHEREVER YOU ARE

In this course, participants explore applying leadership principles to their current role – no matter the job level. Participants learn to differentiate between leadership and management; learn effective followership characteristics; and learn how to identify leadership opportunities. The course also examines interpersonal communication topics such as managing conflict, understanding emotional intelligence, and respecting diversity. Participants leave the course with a personalized leadership skills development plan.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

Course Length: 1 day

DEVELOPING STRENGTHS-BASED LEADERSHIP

Learn the advantages of leading and leveraging strengths-based teams. In this interactive workshop, participants identify their own talents and develop strategies to leverage team talents. This workshop is based upon Gallup's extensive research findings that indicate people who work from their strengths are happier, more engaged in their work, and are more productive. Each participant will complete the Gallup StrengthFinder assessment prior to the workshop. During the workshop participants develop individual and team action plans and prepare to apply their strength-based leadership skills in their day-to-day working environment. Upon completing the workshop each participant receives the bestselling

book *Strength-Based Leadership*. This facilitated workshop may also be used as a teambuilding opportunity with intact teams. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Professionals seeking to advance leadership skills and optimize teams.

Course Length: 1 day

LEADING TEAMS AND PROJECTS

This two day course assists participants in defining, managing, and executing leadership responsibilities within the context of being a team or project lead. Whether officially named team leader or if positioned within the role unofficially, participants learn key traits and actions that lead to successful leadership. Topics that are discussed in this course include the differences between teams and projects, personal leadership styles and its implementation, change management, facilitation skills, and motivation techniques. Participants use an assessment tool to examine their own approaches to projects and teams. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Professionals interested in leading teams.

Course Length: 2 days

24/7 COACHING®

Developing coaching skills is becoming a key leadership competency for government managers. Hundreds of leaders have benefitted from one-on-one leadership coaching over the past decade. Now, recent survey results demonstrate that using coaching skills in day-to-day interactions has a positive impact on employee communication and motivation. In fact, some managers who have taken the 24/7 Coaching® course report that using coaching skills ends up saving them time in the long run because employees begin to solve their own problems rather than running to their managers. As a manager you are expected to develop your “soft” skills, but there are few behaviorally based training programs to help you get there. In this workshop, participants learn when and how to use specific coaching skills in their everyday work to improve their professional relationships, and increase direct reports’ engagement and productivity. Participants also learn when it is more effective to be a coach rather than a “director” or “manager”. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to attend this course to meet the 8-hour annual refresher training requirement. Also appropriate for professionals interested in coaching.

Course Length: 2 days

SERVANT LEADERSHIP

Servant leadership is a practical philosophy developed by Robert Greenleaf, which supports people who choose to serve first, and then lead as a way of expanding service to individuals and institutions. Servant leaders may or may not hold formal leadership positions. Servant leadership encourages collaboration, trust, foresight, listening, and the ethical use of power and empowerment. This course fosters examination of organizational values and gives participants a chance to practice the principles of Servant Leadership. Additionally, participants examine and discuss the concept of good followership. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Professionals who want a better understanding of leadership.

Course Length: 2 days

LEADERSHIP SKILLS FOR NON-SUPERVISORS

Federal employees who aspire to become managers and supervisors in the future rarely get the leadership training necessary to prepare them for a promotion. It is important to groom high-potential employees for positions of leadership by training them early. To facilitate good succession planning, this course helps future managers and supervisors with the skills that they'll be called on to utilize as they move up the ranks such as decision making, effective communication, delegation techniques, and leadership behaviors. By the end of this two- or three-day session, non-supervisors increase their knowledge and skills in areas that will prepare them to lead into the future with confidence and professionalism. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Professionals who aspires to a position of leadership. This course is ideal for those who have been identified by current management as potential managers or supervisors.

Course Length: 2-3 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

PERFORMANCE MANAGEMENT FOR SUPERVISORS

This course is designed to equip managers, supervisors, and team leaders with key concepts, sound practices, and practical tools and techniques for managing the performance of their employees. Supervisors must expand and grow employee skills, and help prepare themselves and their employees to meet the mission and goals of the organization. Performance Management is a key factor in creating a capable and adaptable workforce. Using exercises and discussion, the course covers the phases of performance management process: Planning, Monitoring, Developing, Rating, and Rewarding. Participants practice setting expectations and providing effective feedback. Facilitators use the

Department's performance management system as the basis of the course. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

Course Length: 1 day

PERFORMANCE MANAGEMENT CHECK-IN FOR SENIOR MANAGERS AND EXECUTIVES

This course is designed to equip senior leaders with techniques to apply performance management as a key driver toward building and sustaining high performance within their organizations. Performance goals and measures are an effective way to communicate the organization's priorities, deploy resources, delegate authority, and define accountability to ensure the mission is met. Research demonstrates that communicating priorities and goals stimulates employee engagement and builds momentum toward higher performance. This course covers: strategically applying the fundamentals of performance management to build a more effective leadership team; setting the standards for performance management throughout the immediate organization; identifying the attributes of effective performance planning; providing effective feedback, and describing and modeling the behaviors in an organization. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Experienced managers may wish to take this course to meet part of their 8-hour annual refresher training requirement.

Course Length: 0.5 days

WRITING PERFORMANCE OBJECTIVES

This course provides the opportunity for supervisors and managers to write performance objectives or performance standards based on the department's performance management system. The course covers the benefits of setting expectations, aligning with organization mission, goals and objectives, writing clear performance expectations based on the SMART model, communicating expectations to employees, and holding themselves and employees accountable. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

Course Length: 2 days

IDENTIFYING AND CLOSING PERFORMANCE GAPS

An integral part of performance management is establishing accountability for individual and organization performance at all levels, from individual employees to senior leaders. Employees are held accountable for results; and supervisors and managers are accountable for their guidance and direction of their work units. This course covers the work needed to support the mission and goals of the organization; inventorying the competencies and skills of the work unit to determine gaps; developing workable strategies for closing performance gaps; developing communication strategies for ensuring understanding of performance expectations and accountability; and, describing the organization infrastructure for supporting performance. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

Course Length: 1 day

COACHING FOR PERFORMANCE CONVERSATIONS

Organizations of all sizes and stripes are focusing on how the implementation of new performance systems, including complex multi-tiered systems, affects the way in which managers and their employees plan for, monitor, evaluate, and reward performance. An important component of this process involves quarterly coaching sessions between managers and employees to discuss performance. For the sessions to be worthwhile, both managers and employees should know what to expect and then how to execute an effective coaching session. This course covers how to make the best use of these sessions by teaching how to prepare for the sessions, how to give and receive feedback, how to communicate your wants and needs, how to ask better questions and listen strategically, how to praise, give guidance, and administer advice. This course is a comprehensive roadmap for any organization whose current performance planning and coaching sessions are going nowhere. It is ideal for managers only, employees only (*How to Receive Coaching*), or a mixed group. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

Course Length: 1-2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

LEADERSHIP THROUGH EFFECTIVE COMMUNICATION

This course is a highly interactive session focused on developing powerful communication skills to lead people and manage projects. The course emphasizes personal communications preferences and the impacts of these preferences on others, and provides tips and techniques for maximizing effectiveness in leading project teams. Skills-based lessons include the use of different communications styles,

managing conflict, giving and receiving feedback, and applying appropriate decision-making techniques. The course provides a practical and effective toolkit for communicating in a project-focused environment, and a resource list for continuous learning.

Target Participants: Prospective Level 2 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 2 core course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3 days

CLEAR COMMUNICATION SKILLS FOR MANAGERS AND SUPERVISORS

Good communication skills are an essential tool in the toolkit of a successful manager, and this program can help improve these skills. This intensive workshop provides guidance on advanced-level communications skills specifically for those who manage and direct others. Not only will participants be provided with concrete skill-building tools, but they will also learn strategies to enhance their oral and written communications. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to attend this course to meet the 8-hour annual refresher training requirement.

Course Length: 2 days

EXECUTIVE COMMUNICATIONS

Executive Communications is designed to provide DOE participants with high-level communication skills to address issues/activities of specific importance to internal, public, media, and congressional audiences. The course addresses how to engage different audiences depending on their needs and interests, create effective messages, and improve delivery skills for a variety of formats including print media, TV, and panel discussions. During this training program, two Executive Communication Coaches offer key techniques through interactive modules and video practice to help DOE participants deliver successful presentations, media interviews, and congressional testimony or briefings. DOE participants are encouraged to share their experiences as senior-level managers who have been involved in the project management process. The objective of this course is to help each DOE participant enhance their current communication knowledge to effectively communicate powerful, positive messages to target audiences.

Target Participants: Prospective Level 3 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 3 core course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3 days

CHANGE AND TRANSITION MANAGEMENT

The speed of research and development, information sharing and knowledge management requires that organizations keep in constant motion, changing processes and people almost incessantly. Rather than focus on “managing” change, this workshop shows participants how to harness the energy and excitement of the new to accelerate achievement and results. This course helps participants increase their capacity to assess the outcomes of proposed changes, build organizational support, develop plans to manage transitions, and assess the effectiveness of both transition and change. It is designed to encourage best practice leadership behaviors and addresses in multiple lessons the Executive Core Qualifications (ECQs) of leading change, results driven, business acumen, building coalitions, and fundamental competencies. Topics include: Fundamentals of Change and Transition, Validating the Need for Change – Building the Business Case, Planning the Transition: Developing the Action Plan, Implementing and Monitoring Transition Activities and Assessing the Success of Change and Transition. The majority of the class time is spent in discussion, reflection, hands-on, and action-learning activities resulting in successful leaders who demonstrate both the ability to envision, market, and implement changes and the ability to assume ownership and implement changes designed by others. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement. Also appropriate for managers and senior leaders responsible for leading change initiatives or transitions.

Course Length: 1-3 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

MANAGING A VIRTUAL WORKFORCE: MAKING TELEWORK WORK

With more and more employees taking advantage of workforce flexibilities such as telework and alternative work schedules, much of today’s work is done in a virtual environment. Supervisors and employees need to have the skills and tools to productively work in this new operating environment. This course provides supervisors and managers with practical tips and advice for managing a remote workforce, and provides employees who telework with tips for effectively engaging with their supervisors, colleagues, and customers. The course discusses challenges associated with working in a virtual environment, including communications, networking, technology and management challenges. Participants also examine their own personal biases and underlying personal fears and concerns. Participants learn tips and techniques for setting clear expectations and managing remote staff effectively; collaborating in a virtual environment; and communicating effectively with supervisors, employees, and customers. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement. Especially appropriate for supervisors managing remote workers and employees wishing to take advantage of telework.

Course Length: 1 day

DEALING WITH DIFFICULT PEOPLE

This program prepares participants to effectively manage conflict and negative work situations with a minimum of fallout. In this course, participants learn to diffuse anger, prevent unnecessary miscommunication and conflict, and improve personal relationships with colleagues, partners and vendors. Some of the topics covered include: identifying types of difficult behavior, understanding why these behaviors may be displayed, developing self-awareness of how one reacts to difficult people, practicing behavioral interventions, and knowing the difference between a behavior problem and a personnel problem. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

Course Length: 1-2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

FACILITATING CONFLICT RESOLUTION

This course covers a variety of topics specific to the issues of facilitation of conflict resolution. Areas discussed include: recognizing potential conflict situations and neutralizing them before they escalate; using problem-solving and decision-making techniques to meet the needs of everyone affected; negotiating "win-win" solutions for all parties involved; and minimizing or resolving conflict in groups and between employees using appropriate interpersonal strategies. The course includes a significant emphasis on the use of facilitation techniques within the conflict resolution process.

Target Participants: Prospective Level 3 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 3 elective course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3 days

NEGOTIATION STRATEGIES AND TECHNIQUES

This course is presented in a workshop format in which participants learn about collaborative and competitive negotiations, negotiation strategy and planning, negotiations within and between teams, identifying key stakeholder interests in negotiations, determining best alternatives to negotiated agreements, responding to conflict, and creating trust. The objective of this course is to provide participants with methods and strategies that improve their performance in negotiating agreements. Participants then practice using learned strategies during the course. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Prospective Level 3 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 3 elective course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3 days

TURNING THE TABLES ON CONFLICT

This course prepares participants to take on “problem” people, conflict, and negative work situations with a minimum of fallout. Participants learn to diffuse anger, prevent unnecessary miscommunication and conflict, and improve personal relationships with colleagues, partners, and vendors. Participants create a personal action plan to help guide them in applying the skills learned from the course to their jobs.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

Course Length: 1- 2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

LABOR MANAGEMENT RELATIONS

This course provides participants with a basic overview of labor management relations. Participants learn about labor laws and regulations, implementing bargaining practices, and applying methods for resolving disputes. Additionally, the course covers the Federal labor relations program, working with unions and unionized employees, and guidance on contract interpretation.

Target Participants: Prospective Level 3 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 3 elective course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3 days

BEST NEGOTIATING PRACTICES®: CREATING AND CAPTURING VALUE AS YOU NEGOTIATE

This workshop identifies and develops the negotiating and bargaining skills necessary for today’s global, dynamic business environment. Business professionals, government executives, and attorneys must be able to effectively negotiate agreement when budgets, performance standards, priorities, relationships, and due dates are at stake in order to meet and exceed established organizational goals. Attendees will thoroughly explore and learn “real world” negotiation techniques critical to today’s decision making process and improved performance. The course focuses on learning from shared experiences of your colleagues, practicing your skills in increasingly demanding negotiations, and producing repeatable, predictable results in your negotiations. Key modules are bargaining, preparation, and information

exchange and validation, with a focus on the most critical Best Negotiating Practices®. Participants create a personal action plan to help guide them in applying the skills learned from the course to their jobs.

Target Participants: Program and project managers, acquisition specialists, procurement, contracting officers, executives, and supervisors.

Course Length: 1-2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

BEST NEGOTIATING PRACTICES® FOR LAWYERS: CREATING AND CAPTURING VALUE AS YOU NEGOTIATE

This workshop identifies and develops the negotiating and bargaining skills necessary for today's dynamic legal practice. Attorneys must be able to effectively negotiate agreement for their agency clients when budgets, performance standards, priorities, relationships and due dates are at stake in order to meet and exceed established organizational goals. Attendees will thoroughly explore and learn "real world" negotiation techniques critical to today's decision making process and improved performance. The course focuses on learning from shared experiences of your colleagues, practicing your skills in increasingly demanding negotiations, and producing repeatable, predictable results in your negotiations. Key modules are bargaining, preparation, and information exchange and validation, with a focus on the most critical Best Negotiating Practices®. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Attorneys in civil and criminal litigation, contracting and acquisition, policy, regulation, and legislation.

Course Length: 1 day

TECHNIQUES FOR MANAGING THE MULTI-GENERATIONAL MIX

This course sets the foundation for a clearer understanding of the characteristics of the five generational groups currently represented in the workplace and how managers can use a working knowledge of their differences to be more effective at getting the mission of the organization accomplished. Even non-managers will benefit through greater awareness and understanding of what makes their peers and their managers "tick". Participants learn do's and don'ts of working with each group, examine common assumptions groups have about each other, and how to enhance communication to best leverage the strengths of each group. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement. Highly recommended for supervisors, managers, and team leads who manage multi-generational work teams.

Course Length: 1-2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

STRATEGIC THINKING

This course conducts a series of interactive, hands-on, one-day workshops that will identify the critical elements of strategic thinking, help individuals assess their ability to think strategically, and provide practical tools and techniques to apply strategic thinking skills to their daily work. Participants leave the workshop with a personal application plan including measures of success. A follow-up group work session will assess individual (and team) progress against the benchmarks of their action plans, and provide additional strategic thinking and implementation tools to accelerate progress in the future.

Target Participants: Professionals interested in learning more about elements of strategic thinking.

Course Length: 2 days

WORKFORCE PLANNING FOR MANAGERS AND SUPERVISORS

This course provides supervisors and managers with tools to address their day-to-day workforce planning responsibilities. The goal of workforce planning is to have employees with the right skills to meet the goals and objectives of the organization and the Department of Energy (DOE).

The course provides the basic principles of workforce planning as well as practical, real-world solutions applicable to DOE. Best practices used by both private and public sector organizations are also provided for the participants. This course uses a variety of training methods including individual and group work assignments, group discussions, exercises, and instructor-led training.

Target Participants: Experienced supervisors and managers may wish to attend this course to meet the 8-hour annual refresher training requirement. Also appropriate for professionals interested in workforce planning.

Course Length: 3 days

SUCCESSFUL MENTORING SKILLS

Successful mentoring programs encourage relationships that support the learning and development of targeted employee populations. Mentoring is an important component of an effective succession strategy. Effective mentoring requires commitment and the development of a specific skill set. This course provides the skills necessary to mentor effectively so as to produce rapid improvement and lasting results. Some of these skills include: creating an effective protégé/mentor relationship, managing expectations, evaluating strengths and weaknesses, and providing reinforcement or corrective feedback for positive development. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

Course Length: 1-2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

UNDERSTANDING BENCHMARKING

Benchmarking provides a comparative analysis of an organization's activities to "Best Practices" in world class organizations. This program covers the fundamentals of benchmarking practice, including the Five W's – who, what, when, where and why, and the how-to. It is designed to tailor discussions and exercises directly to organizations' operating in the most complex financial environment in existence in the world today - the internal financial operations of the U.S. government. It trains participants in the terminology, techniques, approaches, and issues related to successful benchmarking projects. It also familiarizes participants with available resources to assist in successful benchmarking activities and OMB A-76.

Target Participants: Executives who seek to improve organizational performance and discover how to model best practices of top organizations. Financial managers looking to maximize organizational efficiency.

Course Length: 1-2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

Personal Development Topics

TRUSTWORTHY™ CUSTOMER SERVICE

In this interactive course, participants learn how to improve their customer service skills to build stronger and more effective relationships with customers, and to improve their overall individual and organizational effectiveness. Participants learn how to identify customers and their needs, and learn the fundamental attributes of strong customer service skills. The course uses a series of mini case studies and individual assessments to help participants focus on the steps they need to take to provide exceptional customer service. Participants receive a set of practical tips and techniques that they can apply immediately to their current projects. At the end of the course participants leave with a personal development plan to further enhance their consulting customer service skills while on the job. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: This course will be of interest to any professional wishing to improve their customer service skills.

Course Length: 2 days

USING CONSULTING SKILLS TO IMPROVE INDIVIDUAL AND ORGANIZATIONAL PERFORMANCE

This course covers how to use consulting skills to create stronger partnerships with key customers and to enhance overall effectiveness as an internal consultant. Participants learn a systematic process for engaging in consulting assignments including steps for gaining a clear understanding of customer needs and expectations. Participants learn about, and then practice new consulting skills. As part of the course, participants work on a case study and receive a set of assignments to be completed in class that require them to apply consulting skills in their own work environment. They then report on their resulting experiences. Topics covered include managing the client relationship, gaining the information they need to create a solution that meets or exceeds customer expectations, applying project management skills in a consulting environment, leading teams in a consulting environment and developing effective recommendations. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: This course will be of interest to professionals who wish to employ consulting skills to improve their individual or organizational performance.

Course Length: 3 days

CRITICAL THINKING SKILLS

Accelerated change, constant reorganization, and down-sizing are trends that place new demands on our ability to quickly judge and to make decisions. This course consists of highly interactive learning focused on the real-world skill of critical thinking. Critical thinking skills are focused on the organizational and individual challenges of the participants' professional world. One of the elements of

critical thinking is that “one size fits all” does not work. This course covers topics such as: measuring risk, applying systems thinking, and consensus building. All participants will be provided with a bibliography that includes works by Roger von Oech, Peter Senge, Margaret Wheatley, and other leaders in critical thinking and innovation. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Professional who wish to improve their critical thinking skills.

Course Length: 2 days

CREATIVE PROBLEM SOLVING

This course consists of highly interactive learning focused on real-world problem solving. Active learning will take place through simulations that connect content to participants’ world of work. Some of the topics covered include: unlocking mental blocks, creating safe environments for questions, applying systems thinking, solutions testing, and clarifying organizational values. This course is customized to meet the unique challenges of the participants. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Professionals, regardless of job description or organizational role, who seek better, quicker solutions to workplace problems.

Course Length: 2 days

MAKING MEETINGS WORK FOR TIME-CRUNCHED EXECUTIVES

A recent survey of 38,000 workers worldwide found that workers consider ineffective meetings the primary “productivity pitfall” across every type of organization. In fact, employees spend an average of 5.6 hours per week in meetings, and 69 percent of that time is deemed to be ineffective. This course helps participants change the way they conduct meetings by teaching techniques for running and participating in meetings. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Professionals interested in improving the effectiveness of meetings.

Course Length: 1-2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

CHANGING DIMENSIONS OF DOE

This course is designed to provide the participant with knowledge of DOE's changing priorities and provide an opportunity for active participation in DOE's future. Participants are provided access to key DOE organizational leaders and interact with the DOE leadership. Topics for the sessions include: managing for results in DOE; quality focus; environmental priorities; organizational initiatives; laboratory relationships; public policy process; Congressional policy perspectives; exploration of Capitol Hill;

performance management; techniques for positive change in DOE; and developing action plans. Workshop includes: preparing for change, planning for change; and group feedback.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement.

Course Length: 4 days

ETHICS AND DECISION MAKING

Ethics policies and procedures apply to all employees, so everyone needs to be conversant with the applicable regulations. This course presents the nature, sources, requirements of ethics provisions, and consequences for failure to comply in an informative, interesting, and relevant manner. The class focuses on understanding ethics-based concepts and systems, rights and responsibilities, individual compliance with ethics policies and procedures, and how to make ethical decisions. The approach is interactive and encourages questions. Each ethics program will be tailored to the individual organization and its relevant provisions. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Employees who are required to take ethics training or would benefit from a greater understanding of ethics policies and procedures.

Course Length: 1-2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

PLATFORM SKILLS – MORE THAN JUST PUBLIC SPEAKING

Verbal skills sometimes thought of as 'platform' skills play a key role in how leaders and managers are able to convey themselves effectively. This course teaches participants to express complex ideas and concepts in language and terms that are understandable by people who come from diverse backgrounds. Having polished communications skills, both verbal and written becomes increasingly important as persons advance their careers to higher levels in their organizations; this course allows participants of all career levels to practice platform skills and receive instructor and peer feedback for improving their effectiveness. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Professionals interested in learning the basic principles of public speaking.

Course Length: 1 day

BUSINESS WRITING

Most professionals are required to write as part of their job, but often find drafting, writing, and editing documents time-consuming and frustrating. The overriding goal of this course is to help experienced

writers create and edit mistake-free business documents with greater clarity, economy, and speed. Participants learn to plan, organize, and structure documents for maximum effect, to determine the appropriate language, style, and tone for each document, to use clear and concise language, to avoid major grammatical errors, reduce the time spent preparing and writing documents, to proofread material and collaborate with others to create clear documents and basic punctuation, grammar, and spelling. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Professionals interested in improving their business writing skills.

Course Length: 2 days

PERSUASIVE LEGAL WRITING AND REASONING

This course is a fast-moving, thought-provoking writing program for attorneys, paralegal staff, and legal resource analysts. From the outset participants are engaged with easy-to-apply writing techniques designed to strengthen the clarity and persuasiveness of briefs, memoranda, correspondence, regulations, and other writing. Attorneys who complete this program earn CLE credits, and the program can be customized to meet the agency's specific objectives or to address any legal specialization. The writing method presented in this workshop was developed from fifteen years of working with the most successful and demanding professional firms, federal agencies, and Fortune 500 Corporations, and bar associations. The result is a thoroughly researched and proven writing program that will empower busy law professionals to more effectively meet their communication challenges. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Attorneys, paralegal staff, and legal resource analysts (LRAs) wishing to accelerate their writing and improve its effectiveness.

Course Length: 2 days

PRESENTATION SKILLS

The purpose of this workshop is to help participants learn how to develop and deliver high impact presentations. It covers the skills necessary to effectively design, develop, and deliver presentations.

The first half-day consists of an overview for all participants of the ingredients necessary to deliver a winning presentation, including how to use a variety of communications styles, how to use audio-visual aids effectively, and other techniques. The course also presents the most common mistakes presenters make, strategies for addressing anxiety about public speaking, and strategies for engaging audiences. The remainder of the course is dedicated to practicing these skills. Participants design and deliver a five-minute presentation. All participants are videotaped, critiqued and then given the opportunity to perform their presentation again. During the presentation, participants focus on minimizing their weaknesses and enhancing their strengths. Each participant gets a copy of the videotape to take home. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Professionals interested in enhancing their presentation skills, including anyone who makes presentations for internal work situations, customers, or outside groups.

Course Length: 2-3 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

FACILITATION SKILLS

This course is designed to prepare participants to facilitate meetings and group processes in a number of government settings, including: internal organizational meetings; cross-organizational meetings; and multi-stakeholder and public meetings. Roughly 50 percent of the class time is spent in exercises and discussions following up on exercises. All of the participants have an opportunity to be videotaped facilitating a mock meeting. Key topics include developing agendas for meeting and programs (multi-meeting engagements), ground rules for running effective meetings, managing difficult participants, voting models and their application in meetings, techniques for focusing discussions and building consensus, facilitating brainstorming sessions, and focus groups. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Professionals wishing to improve their facilitation skills.

Course Length: 2 days

FACILITATING GROUPS: THE ACTIVE FACILITATION APPROACH

The move toward more frequent use of groups and teams to accomplish goals has increased demand for skilled facilitators who can help such groups achieve optimal productivity. One method that has emerged and is utilized in this training is the Active Facilitation Approach. As the name implies, this method requires the facilitator to become engaged in the group's processes. However, rather than become involved in the content of the group's work, this method places the facilitator in a leadership role that has significant impact on the group's effectiveness. Although designed for novice facilitators and those who have not yet facilitated a group, the information presented in this program can be helpful to experienced facilitators, whether or not they've ever applied the active facilitation approach. This session is useful for a wide range of group process settings, including business meetings, team meetings, retreats, work sessions, or other group meetings in which the goal is to make decisions and take action. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Professionals responsible for leading or facilitating groups, retreats, teams, or meetings.

Course Length: 1-2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

EMOTIONAL INTELLIGENCE: EXPANDING YOUR EMOTIONAL QUOTIENT

Emotional intelligence is knowledge of emotions and having the ability to sense, understand, and apply the power of emotions as a source of energy, information, and influence. This course focuses on knowing and understanding one's own emotional quotient (EQ) and learning how to increase it. Participants learn how EQ affects how one deals with other people, how it plays into decision making processes, and what one can do with improved emotional intelligence to make the workplace more productive and enjoyable. The training is based on the work of Daniel Goleman, and it focuses on the skills of listening, self-awareness, understanding, decision making, and leadership. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to attend this course to meet the 8-hour annual refresher training requirement. Also appropriate for anyone who wishes to relate better to others, become a better listener and leader and increase confidence and self-esteem, especially in a team environment.

Course Length: 1-2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

GET ALONG WITH ANYONE, ANYTIME, ANYWHERE: CREATE ENDURING CONNECTIONS WITH CUSTOMERS AND CO-WORKERS

A cooperative spirit cultivates a culture that brings out the best in people and performance, keeping employees happy, energized, and productive. Good interpersonal communication skills boost the bottom line in many ways – by helping to retain employees, improve morale, “win over” customers, create a loyal following, secure repeat business, expand networks, and increase job satisfaction. This course teaches participants to increase their “social IQs”, give feedback in a positive manner, correctly use body language, and adapt communication styles to the situation. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Professionals wishing to improve communications and relationship building skills. Especially appropriate for those involved in customer service, leadership, supervision, and team building.

Course Length: 1-2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

COMMUNICATIONS SKILLS IN A CULTURALLY DIVERSE WORKPLACE

This workshop provides participants with tools to improve their interpersonal communication skills in a culturally diverse workplace. Through the use of video, short films, case studies, and interactive role-playing, participants explore different kinds of communication strategies to interact more effectively with others in the work environment. They also gain insight into different communication styles and rituals and the implications for development of interpersonal and intercultural skills in the workplace. Emphasis is given to practical analysis of typical communication scenarios in the workplace. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: This course is suggested to meet part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers may wish to attend this course to meet the 8-hour annual refresher training requirement.

Course Length: 1-2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

UNDERSTANDING, RECOGNIZING AND VALUING DIVERSITY

This comprehensive workshop broadens participants' understanding of diversity and diversity-related issues in the workplace. Emphasis is given to analysis of changing demographics and implications for meeting organizational goals and priorities in the future. More specific emphasis is given to cultivating a deeper and more profound appreciation for individual and group differences in order to facilitate optimum levels of interaction and performance in the work environment. Participants are both exposed to and engage in numerous activities to help them recognize, value, and manage diversity in the workplace. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement. Also appropriate for any professional who wants a better understanding of diversity.

Course Length: 1-3 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

STRESS MANAGEMENT FOR EFFECTIVE, SATISFIED EMPLOYEES

Stress is our individual response to situations and circumstances. Determining a "right" or "wrong" response provides little value; understanding why we act and react the way we do provides tremendous value by offering the opportunity to change. This course focuses on awareness and new perspectives. Participants learn how we internally "manufacture" stress and how to maximize the benefits of stress while minimizing its negative impact. Participants learn to be healthier, happier, and more productive. The organization benefits with higher productivity, lower absenteeism and attrition, higher morale, and

a more congenial atmosphere, which in turn, can attract more quality workers to the organization. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: All employees, managers and executives who suffer from stress, whose organizations are stressful or who wish to develop a greater appreciation of stress and its effects on individuals and the workplace.

Course Length: 1-2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

BALANCE, EFFECTIVENESS, AND PROFESSIONALISM

Balance is a state of dynamic equilibrium; it promotes effectiveness and professionalism. Balance has multiple components which make up an ever-changing basis of balance. This class begins with a look at the emotional, family, financial, fitness, health, intellectual, nutritional, professional, life purpose, social, spiritual, and stress aspects of balance. The course teaches techniques for maintaining balance, dealing with stress, and staying on track to achieve the balance participants want in life. Participants create a personal action plan to help them apply the skills learned from the course to their jobs.

Target Participants: All employees, managers, and executives who want to improve balance in their own lives, or want to encourage those working with or for them to build balance in their lives.

Course Length: 1-3 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

FERS RETIREMENT SEMINAR

This course is designed to stimulate positive thinking toward proper planning for post-retirement years. The course emphasizes advanced pre-retirement planning rather than specific retirement benefits. Topics covered by this course are FERS benefits, estate planning, financial planning, tax and legal issues, health and fitness or health considerations, social security benefits and Medicare, life after retirement and other retirement benefits such as health benefits, life insurance, and the Thrift Savings Plan.

Target Participants: FERS employees five years from retirement and their spouses.

Course Length: 3 days

CSRS RETIREMENT SEMINAR

This course is designed to stimulate positive thinking toward proper planning for post retirement years. This course emphasizes advanced pre-retirement planning rather than specific retirement benefits. This



seminar covers CSRS benefits, estate planning, financial planning, tax and legal issues, health considerations, social security benefits and Medicare, life after retirement and other retirement benefits such as health benefits, life insurance, and the Thrift Savings Plan.

Target Participants: Civil service employees five years from retirement and their spouses.

Course Length: 3 days

PREPARING FOR LIFE AFTER RETIREMENT

This practical, dynamic program helps participants identify goals, objectives, and next steps toward a new lifestyle. This course complements the FERS and CSRS pre-retirement seminars by helping those who are about to make what is arguably their biggest career move transition seamlessly into a new lifestyle filled with possibilities and opportunities. This course provides the tools needed to grow and thrive for those moving toward retirement. Participants learn goal setting, planning non-financial aspects of retirement, and managing time and interests.

Target Participants: Those who are near retirement and want to get the most out of the transition, especially employees who are uncertain about their transition.

Course Length: 1-2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

Project Management Topics

PROJECT MANAGEMENT ESSENTIALS

In this eight-week course, participants learn about the primary concepts of project management and are introduced to best practices in project management from DOE, other Federal agencies, and the private sector. This introductory course focuses on four major aspects of project management: The Discipline of Project Management, Project Planning, Teambuilding and Effective Leadership, and Project Execution. Based off the Project Management Institute's Project Management Body of Knowledge (PMBOK® Guide) Fifth edition and J. Davidson Frame's, *The New Project Management*, 2nd Edition, students will gain an understanding of how to apply this knowledge to their current projects, and identify ways to incorporate best practices. Various Federal guides and manuals will be referenced throughout the course. However, where specific examples of project management processes or policies are provided, the course will use relevant DOE examples.

This course provides a "blended" learning environment over an eight week period – a combination of the traditional lecture, an intense on-site workshop, case studies, homework, and classroom discussions at regional sites provided through televideo. Although the course provides a familiarity level of the primary concepts of project management, subsequent course and work-related experience builds upon this to establish working and expert levels of project management ability. The course is presented at an intermediate level of expertise similar to what would be expected of an accredited graduate level college course.

Target participants: Prospective Level 1 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 1 core course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 8 weeks

PROJECT MANAGEMENT SYSTEMS AND PRACTICES IN DOE

This seven-week course is organized around DOE Order 413.3B and Guides 413.3-1 through 19 and focuses on DOE's project management systems and practices including the specific roles and responsibilities of a Federal Project Director. It is not a general overview of project management; therefore, it is recommended that participants take *Project Management Essentials* before this class. Using the 413.3B process, especially the critical decision process and how to manage it, participants will gain an expert-level knowledge of the Order's principles and requirements, as well as a working knowledge of other areas necessary to be an expert Project Manager. Other topics covered include the Federal budget process, NEPA and other environment, safety and health laws, and an understanding of DOE HQ field relationship and Lead Program Secretarial Officers (LPSOs). This course provides participants the detailed knowledge required by DOE Capital Assets directives, and articulate how that process interfaces with the budget process, project schedule, and key elements of project management at DOE. The course is designed to assist the participant to fully understand the requirements of DOE's project management system and practices.

This course provides a “blended” learning environment over a seven week period – a combination of the traditional lecture, an intense on-site workshop, case studies, homework, and classroom discussions at regional sites provided through televideo. The course includes extensive readings and analysis and provides participants a chance to share their experiences. This course is presented at an intermediate level of expertise similar to what would be expected of an accredited graduate level college course.

Target participants: Prospective Level 1 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 1 core course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 7 weeks

PROJECT RISK ANALYSIS AND MANAGEMENT

This course is designed to prepare DOE project managers to: determine project risks and develop risk management and mitigation strategies; determine at which points in a project life cycle risk analyses should be performed; evaluate potential risk probability and consequences, determine risk factors; select risk management or mitigation strategies; and develop a risk management plan. Participants also acquire the skills that enable them to assign risk responsibility between DOE and contractors, determine appropriate project cost and schedule contingencies for identified risks, determine appropriate project management and controls tools to assist in managing identified risks, and evaluate project Estimates at Completion (EAC) and remaining contingencies to determine adequacy of funds.

Target Participants: Prospective Level 1 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 1 core course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3 days

PLANNING FOR SAFETY IN PROJECT MANAGEMENT

This course is designed to enhance the DOE Federal Project Director's ability to clearly define and carry out integrated safety management and quality management. Additionally, it provides participants with the necessary information to ensure that all DOE projects comply with DOE standards of safety.

The main objective of this course is to prepare the participant to effectively apply safety management requirements throughout the project acquisition life cycle. Particular emphasis is given to the planning and design phases where application of a Failure Mode and Effects Analysis should identify potential hazards and mitigation strategies. Using a case study, this process examines nuclear, environmental, and worker safety issues in a representative project.

Target Participants: Prospective Level 1 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 1 core course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3.5 days

ENVIRONMENTAL LAWS AND REGULATIONS

This course provides participants an overview and basic knowledge of environmental laws and regulations pertinent to DOE projects. The course includes key DOE directives (especially DOE O 450.1A, DOE O 413.3B and DOE O 430.2B) and applicable Federal regulations and executive orders.

The course introduces the wide range of environmental requirements with which the Department must comply as well as the appropriate resources to assist DOE staff and managers in the event they are asked to support or manage a project with potential environmental impacts. This course also serves to inform DOE employees of their roles in helping the Department to achieve its environmental sustainability goals, including reducing energy use, enhancing pollution prevention, and conserving water. This course is not meant to be an instruction manual for environmental topics at the department; rather, it aims to educate participants as to when to ask questions and to whom they should be directed.

Target Participants: Prospective Level 2 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 2 elective course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3 days

EARNED VALUE MANAGEMENT SYSTEMS (EVMS)

This course is designed to address EVMS and project reporting requirements in order to effectively apply EVMS approaches in project management. Participants learn about Earned Value Management (EVM) processes, how they are interrelated, and how they must be integrated to produce an effective EVM System. The course is based on the requirements of DOE Order 413.3B and the guidance provided in DOE Guide 413.3-10, Earned Value Management Systems. The course is designed to give participants a framework for applying EVMS approaches to project management and knowledge of the process sufficient to oversee contractor EVMS processes. Some of the topics covered include: strategies to plan project work, monitor performance, utilize work breakdown structures (WBS), and collection and interpretation of EV data.

Target Participants: Prospective Level 1 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 1 core course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3 days

ADVANCED CONCEPTS IN PROJECT MANAGEMENT

The course focuses on nine major aspects of project management: Systems Engineering; Value Management; Integrated Safety Management; Quality Planning Assurance and Control; Pre-Project Planning; Project Objectives and Logic; Project Scheduling Under Uncertainty; Critical Chain and Resource Buffers; Process Control; Project Scheduling Under Uncertainty; Critical Chain and Resource Buffers; and Process Control.

In addition to these topics, the course addresses specific individual, team, and organizational competencies and project leadership skills. This course is taught in an approach similar to a graduate

school level course using both distance and on-site learning techniques. The course covers approximately two full weeks of classroom instruction distributed over a two month period. Much of the work will be self-paced during that time.

This course provides a “blended” learning environment over a five week period – a combination of the traditional lecture, on-site workshop, classroom discussions, independent and team research, presentations, and televideo conferences. This course enables participants to apply their Level 1 project management knowledge in an extended research project and introduce a variety of selected topics pertaining to project management processes.

Target Participants: Prospective Level 2 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 2 core course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 5 weeks

ADVANCED CONCEPTS IN FINANCIAL ASSISTANCE

This course is designed to explore advanced topics relevant to financial assistance personnel. The course focuses on aspects of financial assistance management to include quality, NEPA, logistics and sourcing, and team development and management. In addition to these topics, the course addresses specific individual, team and organizational competencies and project leadership skills. It covers the concepts of project management with a special lens of financial assistance at an advanced level of expertise, and expands upon best practices from DOE, other Federal agencies, and the private sector.

Target Participants: Financial assistance professionals interested in Level 2 certification.

Course Length: 5 days

SCOPE MANAGEMENT BASELINE DEVELOPMENT

This course is designed to enhance the DOE Federal Project Directors’ ability to clearly define requirements and scope, develop a defensible baseline, and manage conformance to the baseline throughout the project life-cycle.

The course covers a range of project management issues specific to the competency needs of a Level 2 Project Manager. The objective of this course is to prepare participants to conduct effective requirements planning sessions and to be able to control scope and configuration changes throughout the life cycle of the project. The course emphasizes the development of the Work Breakdown Structure (WBS). Topic areas include baseline development techniques, identifying risk and constraints for requirements, prioritizing requirements, trade-off analysis, iterative requirements management, and scope change/configuration management.

Target Participants: Prospective Level 2 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 2 core course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3 days

COST AND SCHEDULE ESTIMATION AND ANALYSIS

This course provides participants with a high-level overview of cost and schedule estimation techniques necessary for successful project management. Participants receive practical skills training on how to develop independent cost and schedule estimates and how such estimates factor into a project's baseline. The course teaches skills used across the project life cycle, but focuses on estimates developed in project planning and the early stages of project execution (preliminary design).

Course topics include: identifying cost and schedule estimates; basic estimating methods; group analysis techniques; applying life-cycle costing techniques, validating estimates, determining critical path schedule for a project; crashing and fast-tracking methods; and the relationship between budget authorization (BA) and budget outlay (BO) schedules, project estimates, and the project funding profile.

Target Participants: Prospective Level 2 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 2 core course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 5 days

PROJECT MANAGEMENT SIMULATION

This computer-based project management simulation enables participants to exercise and integrate a wide variety of project management skills, including developing defensible project plans; applying PM tools and techniques to plan, track, and control projects; improving project team performance; analyzing project information; identifying complex project tradeoff decisions; and recognizing when to focus on task and when to focus on process.

Target Participants: Prospective Level 2 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 2 core course for certification in the Project Management Career Development Program (PMCDP)

Course Length: 5 days

VALUE MANAGEMENT

Value Management provides participants with a means for re-examining projects with a view to reducing total project costs. It focuses on the basics of what a product or service should offer while addressing a critical appraisal of the sales, cost, use, and esteem value of a product or service through analyzing the embedded functions. The course applies modern practices in the field of Value Engineering and Value Management which emphasize good communications and effective leadership of the people involved.

This course focuses on providing Value Engineering/Value Management essentials to DOE and Contractor personnel from Senior Managers to Project Directors and their extended teams. It includes a general introduction to VE/VM concepts, principles, definitions, success stories and the various legal and regulatory drivers that now mandate its application. It also focuses on building skills and understanding for applying VE/VM practices, tools and techniques to improve DOE project and program cost and schedule results, especially Return on Investment (ROI). The course also teaches skills for organizing a

VM effort, structuring a job plan, and analyzing the functions of systems, equipment, facilities and supplies to achieve the lowest life-cycle costs while maintaining the essential values of safety, performance, reliability, and quality.

Target Participants: Prospective Level 2 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 2 elective course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3 days

ADVANCED RISK MANAGEMENT

The purpose of this course is to provide the Federal Project Director with an advanced understanding of the concepts and applications of risk and opportunity management, within the context of federally managed Department of Energy acquisition projects. This course improves Federal Project Directors' ability to develop and execute project risk management plans and to oversee the risk management activities of their contractors.

The course provides participants with more advanced treatment of risk management principles and concepts. It builds upon the concepts included in the basic *Risk Analysis and Management* course and reviews topics that are appropriate for Level 3 and 4 Federal Project Directors. It also introduces the notion of opportunity with respect to DOE acquisition project management.

In addition to a review of topics covered in the basic course, participants discuss the impact of technology development and how new technology risk affects the typical project. The course also addresses representative project risk management software risk analysis tools, and uses two large capital and operating dollar projects to enhance the learning through case study work.

Target Participants: Prospective Level 3 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 3 core course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3.5 days

PROJECT EXECUTION AND READINESS REVIEWS

This course focuses on the skills necessary to successfully manage engineering and design, construction, acceptance and transition, and project closeout. Participants learn how to organize, manage, and review project designs and documentation, and to oversee contractor performance during construction. Participants also learn the skills needed to identify potential problems and how to plan to avoid them. Participants are given extensive practice in cost and schedule monitoring, including earned-value analysis, trend analysis and forecasting, managing baselines through performance monitoring and change control.

Target Participants: Prospective Level 3 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 3 elective course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3 days

LEED® FOR NEW CONSTRUCTION AND EXISTING BUILDINGS

Leadership in Energy and Environmental Design (LEED®) for New Construction and Existing Buildings is designed to provide participants with the knowledge of the LEED® rating system and five LEED® categories and to make existing buildings and new construction environmentally sound. This course supports the Federal mandates for agencies to improve their buildings' efficiency and environmental performance including green building certification.

Target Participants: Prospective Level 1 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 1 elective course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 2.5 days

CAPITAL PLANNING FOR DOE

In this course, participants review capital planning questions they should ask when a non-information technology capital asset project under the DOE O 413.3B is in each phase of the project's acquisition. The course reviews the documents and reports from the budget formulation and acquisition planning processes that can be used to support the DOE's budget submissions to the Office of Management and Budget (OMB). This course tracks the critical decision deliverables, reports, cyclical budget data, and narratives in the context of a structured capital planning process and the critical decision model for capital asset projects.

Target Participants: Prospective Level 1 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 1 elective course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 2 days

REAL PROPERTY ASSET MANAGEMENT

During this course, participants focus on the requirements of DOE Order 430.1B, *Real Property Asset Management* (RPAM). Participants acquire a systematic, integrated approach to the management of federal real property, order requirements, reporting mechanisms, and roles and responsibilities for RPAM. The course addresses real property planning and management, Ten Year Site Plans, real property status reporting requirements and mechanisms, value management, performance management and DOE and contractor role and responsibilities for real property asset management. Also included in the course are the requirements contained in the February 2004 Executive Order 13327, *Federal Real Property Asset Management* and the January 2007 Executive Order 13423, *Strengthening Federal Environmental, Energy, and Transportation Management*.

Target Participants: Prospective Level 2 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 2 elective course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3 days

SYSTEMS ENGINEERING

This course focuses on how implementation of the Systems Engineering (SE) process, from project initiation through the entire life-cycle, can decrease the likelihood of cost overruns, schedule delays and compromises in program and project technical performance.

This course demonstrates how the SE process is an interdependent (and iterative) approach to technical management, acquisition and supply, system design, product realization, and technical evaluation. The course describes how the SE process cascades through each level of the system, beginning at the top (the system level) and propagating through a series of steps which eventually lead to a preferred system solution. This course describes in detail the purpose and value of each of the specific SE process steps. Step-by-step directions, along with exercises, help course participants determine when each step is complete.

Target Participants: Prospective Level 3 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 3 elective course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3 days

STRATEGIC PLANNING

Strategic Planning provides participants with an introduction to the skills needed to develop effective strategic plans for organizations, programs and projects, and techniques they can employ to make better strategic decisions. Participants review theories and techniques for improving productivity, as well as techniques for formulating and implementing a planning process. Participants are shown how to make decisions based on strategic plans that give specific direction yet remain flexible enough to respond to changing conditions.

Target Participants: Prospective Level 3 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 3 elective course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3 days

PROGRAM MANAGEMENT AND PORTFOLIO ANALYSIS

Focusing on collaboration, defending resources, and creative compromise, this automated simulation and case study addresses developing a strategic view of projects. Participants learn about managing priorities among projects, coordinating the information needs of multiple projects, allocating and managing resources, preparing project staff to meet future needs, balancing responsibilities for project and functional management, and applying project management methods in a complex project setting. The objective of this computer-based program management simulation is to enable participants to gain hands-on experience planning, implementing, and coordinating multiple, complex projects across an organization.

Target Participants: Prospective Level 3 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 3 core course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 5 days

UNDERSTANDING PROJECT MANAGEMENT AND PREPARING FOR THE PMP® EXAM

The purpose of this course is to prepare participants to pass the Project Management Institute's (PMI) Project Management Professional® (PMP®) certification examination. As part of the training, participants take two practice exams and receive feedback on their performance. Course materials include a PMP® exam preparation resource book. Instruction includes application of the concepts in a case study.

Colleague Consulting, LLC is a Project Management Institute (PMI®) Registered Global Education Provider (R.E.P.) authorized to issue Professional Development Unit (PDU) credits for PMI. Course meets PMI requirements for 35 hours of required project management training to sit for the PMP® exam.

Target Participants: Ideal candidates are those project and program management professionals who are authorized to take the PMP® examination within four to twelve months from completion of this course.

Course Length: 5 days

FUNDAMENTALS OF PROGRAM MANAGEMENT

Fundamentals of Program Management is a high-level overview of DOE program management, and a vehicle for allowing the program manager to self-assess which topical areas to more fully pursue. This course is primarily designed for those wishing to learn more about the roles and responsibilities of the Department of Energy (DOE) Program Manager, and current or aspiring program managers wishing to further enhance their understanding of the DOE program management. Participants learn to apply a strategic management system to their program, conduct program planning, develop program management plans, manage the development and defense of their budget, implement their program management plans, work with projects and DOE certified Federal Project Directors to further their program, and evaluate program effectiveness. Other topics covered by this course are promoting of collaborative planning management, motivating teams, developing action plans, identifying key players and making informed decisions using business analysis tools.

Target Participants: This course is suggested as part of the mandatory second year 40-hour training requirements for new supervisors. Experienced supervisors and managers are encouraged to attend this course as a refresher. Also appropriate for professionals interested in gaining an understanding of program management.

Course Length: 5 days

BREAKING THE CODE: UNDERSTANDING PROJECT MANAGEMENT

The purpose of this course is to introduce participants to the basics of DOE's Project Management system and processes in order to improve their performance as members of the project management team.

By the end of this course, all participants should: be familiar with the essential principles and concepts of the discipline of project management as it applies to the work and culture of the Department of Energy, including the National Nuclear Security Agency (NNSA); be able to identify the DOE's project management system and processes throughout the project lifecycle; and more completely understand their performance requirements in the functional areas in which they respond and interact with DOE's Project Directors, project staff, and project contractors.

Target Participants: Professionals interested in gaining an understanding of project management in the DOE context.

Course Length: 3 days

PLANNING AND MANAGING PROJECT TEST AND EVALUATION

This entry-level course provides a general overview and is designed to help participants understand the systems approach to Test and Evaluation (T&E). Through assessment of whether there is a difference between what was expected and what occurred, and the evaluation of the results, participants gain the knowledge they need for effective test measurement. Participants learn to define the types of testing, understand the importance of safety and security testing, and know what is required to develop and effectively manage a T&E plan. This two-day, classroom based course uses a series of case studies to reinforce the T&E basic process and steps which are applicable to all projects. Lessons include: Fundamental Basis of a T&E Program, Component (Unit) Testing, Integration Testing, Performance Testing, Customer Acceptance and Operability Testing, Safety & Security Testing, Systematic T&E Planning, and Managing the T&E Program.

Target Participants: Professionals interested in learning more about systems approach to test and evaluation.

Course Length: 2 days

EXECUTIVE OVERVIEW OF DOE ORDER 413.3B

This high level briefing is designed for U.S. Department of Energy (DOE) contractor executives, managers, and others who need a basic understanding of the structure and requirements associated with DOE's project management system as codified in DOE Order 413.3B, *Program and Project Management for the Acquisition of Capital Assets*. This course covers discussion of the underlying philosophy and structure of DOE Order 413.3B, DOE roles and responsibilities, the five Critical Decisions and the major deliverables associated with each, the required project reviews and their key players, special requirements for nuclear facilities, requirements contained in the DOE Order 413.3B Contractor Requirements Document and the discussion of the implications of DOE O 413.3B for project cost and schedule estimating.

Target Participants: This course will be of interest to any executive professional interested in learning more about DOE O 413.3B. This training is not intended for Field Project Directors, team leaders, planners, estimators or project controls personnel who require a more detailed understanding of DOE Order 413.3B.

Course Length: 2 hours

LIFE CYCLE COST ESTIMATING

This course provides participants with instruction in life cycle cost estimation requirements and policies. Participants apply various techniques and formulae to construct a life cycle cost estimate analysis, and learn how to use life cycle cost estimating in program and project decision-making. This course addresses the topic of life cycle cost estimating from this decision analysis perspective, rather than from an estimate development perspective. Topics include: a brief history of life cycle cost estimating, current laws, directives and policies; a refresher on the principles of time value of money; analyzing cost estimates to ensure proper incorporation of life cycle estimating principles and decision making; and a review of representative DOE estimates to apply these skills.

Target Participants: DOE personnel whose responsibilities include the development, oversight, or review of program and project cost estimates.

Course Length: 2 days

FACILITIES INFORMATION MANAGEMENT SYSTEM (FIMS) VALIDATION

The course teaches DOE and contractor facilities management staff the standard and process required for validation of key FIMS information. Participants learn the applied knowledge of the statistical principles, validation standard, and the step by step process required to perform a validation on the FIMS replacement plant value (RPV), the asset condition index (ACI), and the asset utilization index (AUI) as well as the other metrics and data elements that will be presented.

Target Participants: Employee interested in learning more about the FIMS validation process.

Course Length: 3 days

Acquisition Management Topics

ACQUISITION MANAGEMENT FOR TECHNICAL PERSONNEL

Every year the Department of Energy spends over 90 percent of its budget on purchases from the private sector. Because of the Federal Government's special fiduciary relationship, the acquisition system established to manage these expenditures of taxpayer monies is very different in some respects from commercial transactions between private parties. The principal purpose of the DOE acquisition system is to deliver on a timely basis the best value product or service to the customer while adhering to the laws, regulations, policies, and directives of the United States Government and the Department. This course examines the portion of the acquisition process commonly referred to as "procurement." This part of the process typically begins with the completion of the acquisition strategy and the development of the acquisition plan. The process proceeds through development of a solicitation, solicitation and evaluation of proposals, and contract award. Another DOE course, Contract Administration for Technical Representatives, continues through contract administration and contract closeout (although these topics are summarized at the end of this course to provide a complete picture of the acquisition process).

Target Participants: Prospective Level 1 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 1 core course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 5 days

CONTRACT ADMINISTRATION FOR TECHNICAL REPRESENTATIVES

This course is specifically designed for Contracting Officers Representatives (CORs). The purpose of this course is to help those employees with valuable technical or functional expertise but little formal acquisition training or experience know what to do and what not to do as CORs. This course provides fundamental knowledge and hands-on exercises to help participants understand the importance of the COR function as it relates to each stage of the contract administration process. Topics include: the Federal acquisition process as it pertains to the COR function; DOE's approach to contract administration; the role of the COR, particularly in relation to the contracting officer and the contractor; the duties of the COR and how to effectively complete assigned responsibilities; and the ethical standards of conduct to which CORs must adhere.

Target Participants: Prospective Level 1 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 1 core course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3 days

FEDERAL FINANCIAL ASSISTANCE FUNDS MANAGEMENT

This course focuses on determining whether prospective award recipients have an adequate financial management system to manage Federal funds and whether they are financially capable to perform the work. To make this determination, participants identify the components of an adequate financial management system and assess a recipient's management system and financial capability based on interactive exercises. Additionally, participants are instructed on Office of Management and Budget Circular A-133 (Circular A-133) audit requirements and determine when an audit is necessary, the roles and responsibilities of participants in the audit process, and reporting and submission requirements.

Upon completion of the course, DOE participants are able to: determine whether prospective award recipients have an adequate financial management system; determine whether a firm is financially capable to perform the work; determine audit requirements in accordance with Circular A-133.

Target Participants: Professionals interested in better evaluating the fitness of financial assistance award recipients.

Course Length: 2 days

FUNDAMENTALS OF FEDERAL FINANCIAL ASSISTANCE

This course gives the participant a foundation in the processes and applications of Federal financial assistance. Participants learn the different ways that Federal dollars are dispensed within DOE (acquisitions versus financial assistance), and that the choice is one that requires exercise of discretion and judgment; the legal framework of assistance and the interrelationships of the relevant laws and regulations; the requirements for preparing a Funding Opportunity Announcement; the process for negotiating and awarding a Federal financial assistance instrument and; the basic topics involved with award administration (recipient cash management requirements, prior approvals, retention of and access to records, audit procedures, handling suspensions, and termination).

Target Participants: Professionals interested in learning more about financial assistance.

Course Length: 5 days

TYPES OF CONTRACTS

This course introduces participants to the various types of contracts employed by DOE. It discusses the aspects of consideration of cost risks in selection decisions, and describes the methods of utilizing fixed price economic price adjustment contracts. Participants gain knowledge of structuring and applying incentives pricing and award fee pricing arrangements.

Course objectives include: understanding the basic principles and limitations for the use of fixed price and cost reimbursement contracts; cost and performance risk in contract type selection; selecting a contract type; applying Economic Price Adjustments and; knowing how to apply incentive and award fee compensation.

Target Participants: Program and project personnel interested in contracting or as a refresher for previously trained procurement personnel.

Course Length: 2 days

INTRODUCTION TO PURCHASE CARD PROGRAM

This course is specifically designed for new cardholders. It requires no prior background in acquisition or other training prerequisites. Its purpose is to prepare first-time users of the Government Purchase Card (P-Card) in what to do and what not to do as cardholders.

This course provides the necessary P-Card process, ethics, and responsibility training. Participants of this course receive instruction in the basic concepts of Government contracting and accountability, and its implementation via the GSA "SmartPay" program. Program points of contact, objectives, specific roles/responsibilities, and basic processes will be explained during the instruction. Participants learn how to properly employ this method for individual purchases to provide timely, cost effective support, while maintaining appropriate attention to fiduciary duties. Practical application of P-Card methodology will be enhanced through course exercises and discussions.

Target Participants: New purchase card cardholders.

Course Length: 2 days

INTRODUCTION TO PURCHASE CARD PROGRAM REFRESHER

This course is designed as a refresher for employees who have already completed the 2-day training on purchase card delegation/appointment. Topics include: instruction in the basic concepts of Government contracting and accountability and its implementation via the GSA "SmartPay" program; the purchase card process; an overview of the DOE acquisition environment, procurement methods, and acquisition reform efforts suitable to provide a context for purchase card use; the statutory, regulatory, and policy requirements related to procurement integrity/ethics, and their application in a purchase card environment.

Target Participants: Employees that have completed the 2-day purchase card training course and are seeking a refresher.

Course Length: 1 day

COR TRAINING REFRESHER

This course is designed to review the COR's of responsibilities and the contracting environment in which they operate. The course also provides the opportunity for CORs to discuss with each other the situations and experiences they have encountered in their performance of COR duties. Finally, the course provides an update on developments in the DOE acquisition and contract management process and presents information on new trends, issues, and concerns in Government procurement. Course objectives include: recalling the operation of the Federal acquisition process as it pertains to the COR function; DOE's approach to contract administration; the role of the COR; understanding of the ethical standards of conduct to which CORs must adhere; the major trends, developments and issues in DOE and Federal Acquisition and contract management.

Target Participants: This course is specifically designed for Contracting Officer's Representatives (CORs) who are required to participate in COR Refresher training every two years.

Course Length: 1 day

MANAGING CONTRACT CHANGES

This course is designed to better prepare DOE Contracting Officers (COs) and Federal Project Directors (FPDs) to manage project changes on complex construction projects through effective management of contract modifications and change orders. DOE guidance, reference materials and actual cases from the Boards of Contract Appeals and the U.S. Court of Federal Claims are discussed to improve participant understanding of principles, concepts and doctrines that impact contract change management in DOE. The course discusses DOE's historical and current contracting environment, the doctrine of constructive change, potential differences between project management changes and contract changes, and the things DOE senior level contracting and program officials can do to improve the effectiveness of the change management process.

Target Participants: Prospective Level 1 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 1 core course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 4 days

PERFORMANCE-BASED MANAGEMENT CONTRACTING

This course is designed so that program and project managers, as well as contracting personnel, better understand the need to continue and accelerate this move toward performance-based major site and facility contracts. The course also addresses the processes by which these performance-based site and facility management contracts are planned, awarded, and managed after award. The overall objective is to focus on major site and facility contracts and to present the performance-based concepts and tools required in each aspect of the planning, award, and post award processes for these contracts. While many of the topics covered in this course are also addressed in other DOE courses, most notably "Acquisition for Technical Personnel," and "Contract Administration for Technical personnel," this course focuses exclusively on major site and facility contracts and the unique challenges involved in making them performance-based.

Target Participants: Prospective Level 1 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). This is a Level 1 elective course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 3 days

COST PRINCIPLES OF FEDERAL FINANCIAL ASSISTANCE

This course is designed to provide any DOE personnel, including those at entry level, who work with Federal financial assistance instruments the information to understand cost principles. Participants learn information on the cost principles of OMB Circulars A-21, A-87, and A-122 as well as FAR 31.2 in order to determine the appropriate amount of cost review necessary to successfully award federal assistance instruments.

Upon completion of the course, DOE participants are able to: distinguish differences among OMB Circulars A-21, A-87, and A 122, as well as FAR 31.2 to judge acceptability of costs; determine whether

costs are allowable or unallowable; assess DOE gray area costs to determine their acceptability; demonstrate knowledge of direct and indirect costs by developing an indirect cost rate.

Target Participants: Professionals interested in gaining an understanding of Federal financial assistance instruments.

Course Length: 2 days

PERFORMANCE-BASED ACQUISITION: PREPARING STATEMENTS OF WORK

This course demonstrates how to lay a solid foundation for any service contract by establishing a sound performance-based approach from the start. Participants learn the critical steps to take in procurement planning and request for proposals preparation to implement the performance-based approach.

Emphasizing preparation of a performance-based work statement, the course focuses on the use of draft solicitations; team development of the work breakdown structure and task identifications; conversion of cost-plus requirements to fixed-price; use of incentives, deductions and penalties in connection with performance goals; and application of specific cost and performance measurement techniques, quality assurance surveillance plans, and quality-related evaluation factors.

Target Participants: Professionals interested in writing effective statements of work.

Course Length: 3 days

CON 100: SHAPING WIN-WIN ACQUISITIONS

This course is designed for employees new to contracting. Participants develop professional skills for making business decisions and advising other acquisition team members toward success in meeting customers' needs. Before delving into technical knowledge and contracting procedures, participants first learn about the different Department of Defense (DoD) mission areas along with the types of business alternatives that may be selected for each area. Knowledge management and information systems, as well as recent acquisition initiatives, will be introduced.

Target Participants: Professionals interested in effective contracting relationships.

Course Length: 4 days

CON 120: MISSION FOCUSED CONTRACTING

This course builds upon previous federal contracting courses and further enhances federal acquisition skills and knowledge. Participants expand their leadership, problem solving, and negotiation skills in this practice-based program that lets team members work through the complete federal acquisition process from needs assessment to contract closeout. Building through each phase of the acquisition process, participants determine how to address issues relating to everything from market research to source selection and award, on through contract administration and closeout.

Target Participants: Professionals interested in mastering the acquisition process. Recommended prerequisites are CON 100, CON 110, CON 111 and CON 112.

Course Length: 10 days

CON 214: PRE-AWARD BUSINESS DECISIONS IN CONTRACTING

In this course, participants build upon Level I contracting courses and on-the-job experiences to gain the knowledge and skills essential in making sound pre-award business decisions. While the course focuses on these important pre-award business decisions, it goes beyond the pre-award phase of government contracting to address the ramifications of pre-award decisions on the award and post-award phases.

Participants gain insight into the techniques used for building successful business relationships, conducting source selections and determining contractor responsibility. They also explore the benefits of strategic sourcing and spend analysis, the various methods of providing contract financing and subcontracting plan considerations.

Target Participants: Intermediate-level contracting professionals interested sharpening their contracting skill set.

Course Length: 4 days

CON 215: INTERMEDIATE CONTRACTING FOR MISSION SUPPORT

In this course, participants apply the knowledge and skills learned in CON 214 and the Level I Contracting courses as they work in teams to complete an extensive, realistic, eight-day federal contract case study to develop and execute business strategies to meet customer requirements. During this highly interactive, integrated case study, participants develop the critical thinking, customer needs analysis, procurement strategy development and source selection skills necessary for successful contract performance.

Participants perform stakeholder and spend analyses to identify opportunities for streamlining and consolidating requirements. Teams then refine a draft requirements package and develop acquisition, procurement and source selection plans. Teams then create a solicitation, respond to industry questions and perform a series of activities revolving around the source selection process. Finally, the case study closes with several activities focused on post-award issues.

Target Participants: Intermediate-level contracting professionals who have completed CON 214 and are DAWIA Level I certified.

Course Length: 8 days

CON 217: COST ANALYSIS AND NEGOTIATION TECHNIQUES

In this course, participants learn the cost and pricing knowledge and skills essential for making sound contracting negotiation decisions. Building on the basic skills learned in Level I contracting courses and on-the-job experiences, Cost Analysis and Negotiation Techniques introduces the techniques needed to analyze cost proposals to establish pre-negotiation objectives for the various elements of cost contained in the proposals. Through an integrated case study, participants will demonstrate their ability to calculate a cost objective and a price/cost objective and determine their pre-negotiation position based on their calculations.

Target Participants: Contracting personnel who work in positions requiring unlimited contracting officer warrants or a Level II Defense Acquisition Workforce Improvement Act (DAWIA) certification.

Course Length: 5 days

CON 218: ADVANCED FEDERAL CONTRACTING

In this capstone federal contract applications course, participants apply the knowledge and skills learned in Level I and II courses as they work in teams to complete an extensive, realistic, ten-day case study to negotiate fair and reasonable prices and to consider the legal implications for various contract situations. In this highly interactive, integrated case study, participants develop the critical thinking, cost analysis, negotiation, and contract administration skills necessary for successful contract performance.

As a team, participants use market research data to develop an acquisition strategy, prepare justification, develop negotiation objectives, and negotiate the requirement. Teams then administer a contract: develop an administration plan, conduct a post-award orientation conference, process a protest, process a performance-based payment request, resolve late delivery and material substitution issues, and perform a series of activities to process and negotiate a request for an equitable adjustment (REA). Finally, teams investigate a possible case of defective pricing, process a partial termination, calculate a final contract price, evaluate contractor performance, and closeout the contract.

Target Participants: Professionals who have completed CON 214, CON 215, CON 216, CON 217, and DAWIA Level I certification.

Course Length: 10 days

CON 353: ADVANCED BUSINESS SOLUTIONS IN CONTRACTING

This course capitalizes on the knowledge and skills gained from previous acquisition training courses, as well as personal experience, to help participants reach the next level in their career. Participants gain key knowledge and skills in critical thinking, problem solving, and successfully researching, writing and presenting business cases to management.

Through realistic scenario-based learning, participants will work in teams to practice developing sound business solutions as a valued strategic and expert business advisor. The course work is designed to prepare participants to contribute solutions to senior leadership and local supervisors. They also gain resources for the contracting career field via the course community of practice.

Target Participants: Contracting personnel who work, or are expecting to work, in positions requiring unlimited contracting officer warrants or a Level III Defense Acquisition Workforce Improvement Act (DAWIA) certification.

Course Length: 10 days

Federal Budgeting and Accounting Topics

FEDERAL BUDGETING PROCESS IN DOE

This course is designed to provide program and project managers a working knowledge of DOE's financial and managerial systems to accomplish the Department's budgeting and accounting processes, including budget submissions, managing authorized funding and establishing success criteria. It emphasizes program and project managers' effective use of these financial systems and processes to accomplish DOE's mission. Participants apply the foundational skills required to successfully manage a DOE project through its financial life cycle. These skills include: integrating projects, programs, and DOE missions; resourcing and funding programs; validating and funding projects; effectively participating in the DOE budget process; managing the flow of funds to your programs and projects and; effectively using DOE's financial accounting and reporting systems to attain program and project success.

Target Participants: Prospective Level 2 Federal Project Directors, DOE Program Managers, IPT members assigned to projects (including matrixed personnel). Experienced supervisors and managers may wish to take this course to meet the 8-hour annual refresher training requirement. This is a Level 2 elective course for certification in the Project Management Career Development Program (PMCDP).

Course Length: 2 or 4 days

**This course is also offered in a 2 day version for audiences who do not need to cover the DOE accounting systems. The 2 day version does not provide PMCDP credit.*

OVERVIEW OF DOE FINANCIAL MANAGEMENT

This course gives participants a high level overview of all aspects of financial management that are unique to DOE. Beginning with DOE's history, current structure, mission, and strategic focus, the course illustrates the framework of financial management within the Department. Roles and responsibilities of the CFO community, and roles and responsibilities at HQ and in the field are discussed. Budget formulation and execution, accounting, business systems and financial reporting requirements are discussed. The course also covers DOE management accountability and controls and the future of financial management at DOE.

Target Participants: Professionals interested in financial management.

Course Length: 5 days

FEDERAL APPROPRIATIONS LAW MASTERY

This course is a 32-hour intensive exposure to the principles and practices of appropriations law in the federal workplace. This course is designed for personnel whose responsibilities include the certification, accounting, and disbursement of federal funds, as well as for program manager and budget officials who must regularly make financial decisions. The course covers the essential elements of appropriations law, beginning with the Constitution and covering key elements of the US Code, court decisions, and decisions of the Comptroller General.

Target Participants: Program managers responsible for Federal budgeting procedures.

Course Length: 4 days

FEDERAL ACCOUNTING STANDARDS

This course is designed to acquaint the participant with key standards of federal accounting. It covers the approved concepts and standards comprising Generally Accepted Accounting Principles for the US federal government, and systematically provides the participants with an understanding of how federal transactions are properly recorded in the accounting records.

Target Participants: Accounting professionals, as well as generalist personnel who desire an in-depth exposure to federal accounting principles.

Course Length: 4 days

OVERVIEW OF FEDERAL ACCOUNTING PRINCIPLES

This course is an overview of key elements of federal accounting and offers professionals who are non-accountants an interesting review of the methodology and practice of federal accounting. The course is useful to all professionals seeking a better understanding of how the United States maintains its financial records and reports financial results.

Target Participants: Professionals interested in understanding the fundamentals of Federal accounting.

Course Length: 1 day

ELEMENTS OF FINANCE FOR SENIOR FEDERAL OFFICIALS

This course is for senior professionals, whether financial or otherwise, and provides an overview of federal finance from a senior-level perspective. It covers the four phases of the federal financial process, including budget formulation, congressional action, budget execution, and reporting, performance measurement and audit. It is designed to acquaint the senior official with the limits of his or her authority and the risks of exceeding assigned authority.

Target Participants: Senior leaders and executives in need of an overview of Federal financing.

Course Length: 2 days

SUCCESSFUL BUDGET JUSTIFICATION AND PRESENTATION

This course enhances the capabilities of federal personnel in preparing, justifying, and presenting budget requests to the OMB and Congress. It focuses on the preparation of materials, technical and financial analysis, presentation techniques, working with congressional committees and staffs, and OMB interface. It will be useful to any professional whose responsibilities include preparing for or conducting liaison with the Congress in the budget cycle.

Target Participants: Professionals involved in the Department's budgeting process.

Course Length: 2 days

FAIR AND REASONABLE PRICING

This course focuses on fair and reasonable pricing as defined in Title 48, CFR, and on the methodologies to attain them. It explores the responsibilities of contracting officers and support officials in making determinations of fairness and reasonableness of pricing data. This course is valuable to all professionals in the business of procuring goods and services for the United States.

Target Participants: Professionals involved in procuring goods and services.

Course Length: 1 day

REIMBURSABLE AGREEMENTS

This course addresses interagency transactions at the federal level. It covers principles of law that apply to all federal agencies, unless a specific agency had alternative statutory authority. Agency-specific issues are incorporated into classroom discussion.

Target Participants: Professionals involved in inter-agency transactions.

Course Length: 2 days

INTRODUCTION TO THE FAR

In this course, participants develop a broad understanding of the Federal Acquisition Regulation and its primary components. Through classroom discussion, lecture, and exercises, participants gain an understanding of the purpose, structure, and usage of the regulation, as well as an understanding of the government contracting process. Topics such as the structure and content of the FAR, definitions and usage of contracting terminology, improper business practices and personal conflicts of interest, and contracting methods and types are discussed.

Target Participants: Professionals interested in an overview of the FAR.

Course Length: 1 or 2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*

GOVERNMENT CONTRACT LAW

In this course, participants develop a broad understanding of the structure, extent and limitations of government contract law, and the related authorities and responsibilities of contracting officers and their representatives. The course enables participants who do not have the benefit of a legal education to understand and apply the appropriate legal concepts in their work endeavors. Key concepts in this course include: laws and regulations that form and underpin government contracting action; types of acquisitions and solicitation techniques; legal requirements and procedures in sealed bidding and contracting by negotiation; the types of contracts, subcontracting, and contract administration and



performance; legal remedies for bidders, contractors and government; and, the roles of the GAO and the US Court of Federal Claims.

Target Participants: Professionals interested in an introduction of Government contract law.

Course Length: 5 days

ACCOUNTING COMES ALIVE™: FINANCIAL LITERACY AND BUSINESS ACUMEN

Accounting Comes Alive™ is a breakthrough learning method that sharpens accounting and financial literacy to enable participants to better understand financial reports. This proprietary system is used at the world's top banks, investment houses, government agencies, businesses, and universities (including Harvard Business School). This course treats accounting as a language instead of a technical, expert topic.

Target Participants: Employees working with budgets or needing to understand financial reports. Appropriate for staff with limited accounting knowledge as well as more experienced managers needing a refresher.

Course Length: 1-2 days

**Course length may be tailored to suit participant needs. The longer course will provide more in-depth discussion and may cover a limited number of additional topics. Please contact Colleague Consulting for details at 301-277-0255 ex. 116 or email info@colleagueconsulting.com*